Monday – June 3, 2019

TIME	HARBOR VIEW BALLROOM (Lobby Level) *CORE SESSION TRACK*	SALON A	SALON D *MODEL RISK MANAGEMENT & VALIDATION TRACK*	SALON G	SALON J	QUINCY ROOM (Lobby Level) *CREDIT UNION TRACK*
7:30–8:15 AM	Registration/Continental Breakfast Outside Grand Ballroom					
8:15–8:45	Current Trends & Conference Overview Matt Pieniazek – DCG Grand Ballroom					
9:00–10:00	Risk/Return Trade-Offs & Current Issues in Balance Sheet Management *Jeff Reynolds — DCG*	Financial Institution Investment Portfolio Management in Volatile Markets *Larry Miele — Wells Fargo Advisors*	CECL Case Study: Surviving — and Acing — Your First CECL Validation *Sam Chen — DCG*	Balance Sheet Hedging Using Derivatives *David Sweeney — Chatham Financial* *Todd Cuppia — Chatham Financial*	M&A from a Buyer's and Seller's Perspective *Fred Price — Sandler O'Neill + Partners*	Navigating the Age Old Conflict between Earnings and NEV in the Current Rate Environment *Darnell Canada — DCG*
10:00-10:15	Break					
10:15–11:15	Measuring & Managing Liquidity *Keri Crooks — DCG*	Who Manages Your Innovation Portfolio? *Jason Henrichs — FinTech Forge*	Where Are We Now? Lessons Learned from Year 1 of CECL *Mike Guglielmo — DCG* *Panel*	Deposit Strategies in the Current Environment *Joe Kennerson — DCG* *Billy Guthrie — DCG*	Winning Loan Growth Strategies Through Trust, Value and Resource *Jack Hubbard — St. Meyer & Hubbard*	
11:15–11:30	Break					
11:30–12:30	Peer Group Breakout Sessions					
12:30–1:30 PM	Lunch					
1:30–2:30	Measuring & Managing Interest Rate Risk *Darnell Canada — DCG*	Current Issues in Liquidity Management *Bob Lallo — DCG* *Patrick Ward — DCG*	The Secrets to Bank Secrecy Act/Anti-Money Laundering (BSA/MSL) Model Validations *Joe Montalbano — DCG*	How Effective ALCOs Help Shape Lending Strategy *Matt Pieniazek — DCG* Zach Zoia — DCG	Winning Loan Growth Strategies Through Trust, Value and Resource *Jack Hubbard — St. Meyer & Hubbard*	
2:30-2:45		Break				
2:45–3:45		Engaging Successfully with Fintechs *Tom Curry — Nutter McClennen & Fish LLP* Jay Cabral — Nutter McClennen & Fish LLP	Cutting-Edge Validation Techniques for Non-Statistical, Black Box and Machine Learning Models *Sam Chen — DCG*	Walking the Talk *Keith Hughey — J. Keith Hughey Company*	Commercial Real Estate Market Outlook — A Macroeconomic Overview *John Affleck — CoStar Group*	Accessing Secondary Capital to Grow Your Credit Union *Bob Colvin — CU Capital Markets Solutions*
3:45–4:00	Break					
4:00–5:30	Kelly McDonald McDonald Marketing Grand Ballroom					
6:00–9:30	New England Aquarium Cocktail Reception/Marriott Long Wharf Lobster Bake					

Tuesday – June 4, 2019

TIME	HARBOR VIEW BALLROOM| (Lobby Level) *CORE SESSION TRACK*	SALON A	SALON D *MODEL RISK MANAGEMENT & VALIDATION TRACK*	SALON G	SALON J	QUINCY ROOM (Lobby Level) *CREDIT UNION TRACK*
8:00–8:30 AM	Continental Breakfast Outside Grand Ballroom					
8:30–9:30	Economic Forecast Mark Vitner – Wells Fargo Grand Ballroom					
9:30–9:45	Break					
9:45–10:45	Developing & Documenting Balance Sheet Management Strategies *Keith Reagan — DCG* *Mark Haberland — DCG*	M&A from a Buyer's and Seller's Perspective *Fred Price — Sandler O'Neill + Partners*	Effective Ongoing Performance Monitoring: Save Yourself Headaches (and Money) *Sam Chen — DCG* *Brett Aitken — DCG*	Walking the Talk *Keith Hughey — J. Keith Hughey Company*	Reforming the Reforms: Reinforcing What Works, Fixing What Doesn't *Wayne Abernathy — ABA*	The Importance of Liquidity Diversification *Keri Crooks — DCG*
10:45–11:00		Break				
11:00–12:00		Financial Institution Investment Portfolio Management in Volatile Markets *Larry Miele — Wells Fargo Advisors*	ALM Modeling in the New Era of Integrated Stress Testing and CECL *Jerry Clark — ZM Financial Systems* *Joe Sass — FIS* *Chris Maclin — Empyrean Solutions*	How Effective ALCOs Help Shape Lending Strategy *Matt Pieniazek — DCG* *Zach Zoia — DCG*	Engaging Successfully with Fintechs *Tom Curry — Nutter McClennen & Fish LLP* Jay Cabral — Nutter McClennen & Fish LLP	Improve Performance and Credit Risk Management in Your Auto Portfolio *Michael Vogan — Moody's Analytics*
12:00–1:00 PM	Lunch					
1:00–2:00	Balance Sheet Management Strategies Case Studies *Mike Carney — DCG* *Vinny Clevenger — DCG*	Who Manages Your Innovation Portfolio? *Jason Henrichs — FinTech Forge*	The MRM 411: Hot Topics in Model Risk Management *Drew Boecher — DCG* *Mike Guglielmo — DCG* *Sam Chen — DCG*	Balance Sheet Hedging Using Derivatives *David Sweeney — Chatham Financial* *Todd Cuppia — Chatham Financial*	Commercial Real Estate Market Outlook — A Macroeconomic Overview *John Affleck — CoStar Group*	Flattening/Inverted Yield Curve Strategies for Credit Unions: Uncommon Sense Alternatives to Consider and Avoid *Frank Farone — DCG*
2:00–2:15		Break				
2:15–3:15		Current Issues in Liquidity Management *Bob Lallo — DCG* *Patrick Ward — DCG*	New Era of Data Management & Validating Statistical Models Joe Montalbano — DCG	Deposit Strategies in the Current Environment *Joe Kennerson — DCG* *Billy Guthrie — DCG*	Reforming the Reforms: Reinforcing What Works, Fixing What Doesn't *Wayne Abernathy — ABA*	All Roads Lead to the Capital Plan — Expect the Unexpected *Steve Boselli — DCG*
3:15	Conference Concludes					